Northwest Territories
2006 – 2007 Aurora Visitor Survey

Tourism and Parks
Industry, Tourism and Investment
Government of the Northwest Territories

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Introduction

Aurora viewing is a major attraction in the Northwest Territories (NWT). Each year, thousands of visitors travel to the NWT between November and March to view the Northern Lights. While a variety of locations within the NWT offer Aurora viewing tours, Yellowknife receives the vast majority of these travellers, and is recognized world wide as a premium Aurora viewing location.

The number of Aurora viewing travellers peaked in 2000/2001 at 13,000 travellers, declining dramatically in the years following 9/11. Since then, the NWT has experienced a slow, but steady increase in Aurora travellers, rising to just over 10,000 travellers in 2005/2006. However, due to increased competition from competing destinations, lack of infrastructure to handle direct international flights, and an increase in costs associated with travel to the NWT, it is estimated that only 7,000 visitors travelled to the NWT to view the Aurora in 2006/2007 – a 30% decline from the previous year. Figure 1 shows the annual estimated visitation for Aurora viewing, along with annual estimates for various other NWT visitor segments.

Figure 1: Annual Visitation Estimates

Northwest Territories Visitation							
Visitor Segment	**2000-01**	**2001-02**	**2002-03**	**2003-04**	**2004-05**	**2005-06**	**2006-07**
Visiting Friends & Relatives	6,126	6,175	7,410	7,599	7,780	8,942	8,427
Hunting	1,300	1,400	1,380	1,117	1,279	1,308	1,252
Aurora Viewing	13,000	6,500	9,000	9,990	10,245	10,200	7,000
Outdoor Adventure	1,480	1,552	1,965	1,841	1,725	2,171	2,079
Fishing	8,611	8,534	8,137	7,759	7,521	7,216	6,721
General Touring	9,251	11,443	15,205	15,219	14,199	13,324	13,340
Total Leisure Visitors	39,768	35,604	43,097	43,526	42,750	43,161	38,819
Business Travellers	16,876	18,313	19,014	20,725	22,591	24,642	24,642
Total Visitors	**56,644**	**53,917**	**62,111**	**64,251**	**65,340**	**67,803**	**63,461**

Survey Methodology

In 2006/2007, a new survey instrument was developed, replacing the previous Aurora Visitors Survey that was used in past years. The new survey was originally developed in English and subsequently translated into Japanese.

Surveys were distributed through all three primary Aurora viewing tour operators based in Yellowknife. As a small incentive, and in order to increase response rates, a unique pin was offered to each guest who completed a survey. This resulted in a total of 1,290 completed surveys.

The 2006/2007 Aurora Visitor Survey was conducted from December 2006 to April 2007, covering the typical Aurora viewing season.

Executive Summary

During the winter 2006/2007 Aurora viewing season, approximately 7,000 visitors travelled to the NWT to view the Aurora. The majority of these travellers originated from Japan and primarily visited the Yellowknife area. A large proportion of Aurora travellers were female (63%), and averaged 36 years of age (66% were between the ages of 21 and 40). Aurora travellers fell into one of two educational categories – either those that completed at least a university degree (50%), or those that had only completed high school (21%). They were either unemployed (14%), working as professionals (14%) or attending school as students (14%). Approximately 57% of those who responded reported an annual income of $50,000 or less.

The average length of stay for Aurora travellers was 3.2 nights, with three-quarters (71%) of the travellers staying for three nights. Three-quarters of Aurora travellers (72%) travelled in groups of 2 or 3, with an average group size of 3.3 people.

Overall, Aurora travellers rated "well known for Aurora viewing" as the most important consideration when deciding to visit Yellowknife (4.7 out of 5). Other important considerations included "cost of package tours" (3.8 out of 5), and "variety of tours available" (3.2 out of 5). The most common place for Aurora travellers to hear about the NWT as a vacation destination was through a travel agent (42%). Friends or family were the second most common source of information (28%), while television (23%) and the internet (22%) were also fairly common. Overall, Yellowknife was very favourably viewed by the majority of Aurora travellers – three quarters (75%) rated the city a 4 or 5 out of 5 in terms of overall satisfaction.

Approximately 5% of Aurora travellers indicated they had visited the NWT on at least one previous occasion, while another 6% of Aurora travellers had visited other Aurora viewing destinations in the past, including Finland (2.9%) and Alaska (1.9%). When asked to identify any other destinations to which they would have travelled had they not visited the NWT, Aurora travellers identified a variety of locations, including Alaska (5.8%), Finland (5.0%) and Whitehorse (3.8%). A large proportion of Aurora travellers who visited the NWT in 2006/2007 also visited other Canadian locations, including Niagara Falls (36%) and Vancouver (22%).

In 2006/2007, approximately 91% of Aurora travellers were able to view the Aurora while they were in the NWT. The success rate rose from 76% for those staying two nights or less, to 92% for those who stayed for three nights or more. Overall, travellers rated their Aurora viewing experience very highly. The average rating was 4.1 out of 5, with 42% rating the experience as having exceeded their expectations (5 out of 5).

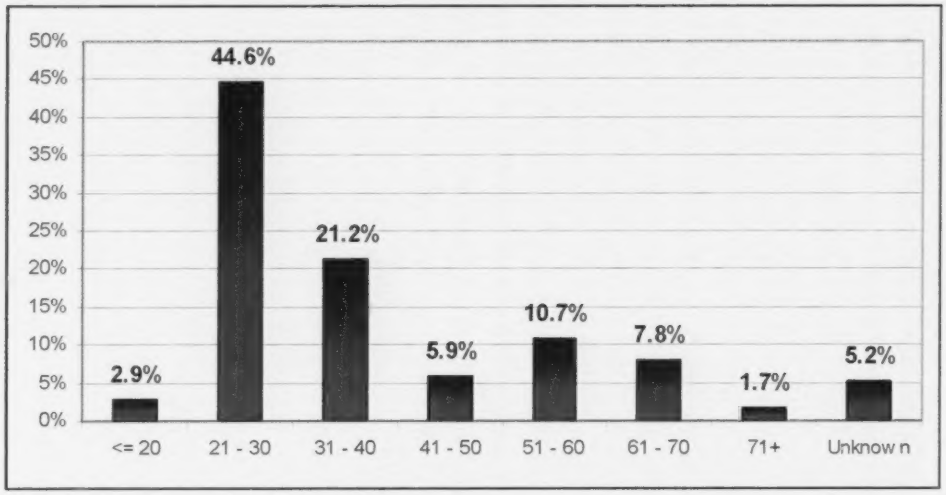
Aurora travellers participated in a variety of activities while in the NWT, including town tours (88%), shopping (87%) and photography (84%). The activities Aurora travellers were most satisfied with were snowmobiling (4.6 out of 5), and dogsledding (4.5 out of 5). Approximately 42% indicated that there were activities they had wanted to participate in, but did not get the opportunity to, such as flightseeing / wildlife viewing, snowmobiling, dogsledding and ice fishing. Aurora travellers were also asked to rate the various services, products and infrastructure they encountered while in the NWT. Overall, the highest rated services included 'variety of tours' (3.73), 'cleanliness of towns' (3.71) and 'visitor centres' (3.69). The lowest rated services included 'signage' (3.44) and 'airports' (3.28).

On average, Aurora travellers spent approximately $395 per person while in the NWT. Of that total, they spent the most on optional tours (approximately $273 per person) and the least on traditional arts and crafts ($25 per person).

Age

The average age of Aurora visitors was 36 years old. However, over 44% of Aurora visitors were between the ages of 21 and 30.

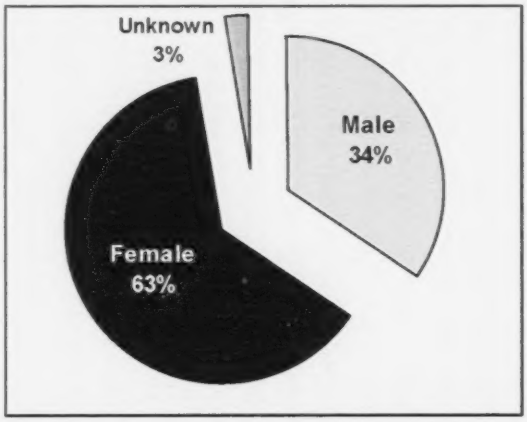
Figure 2: Age



Gender

Overall, the majority of Aurora visitors were female (63%). Just over one-third (34%) of the respondents were male.

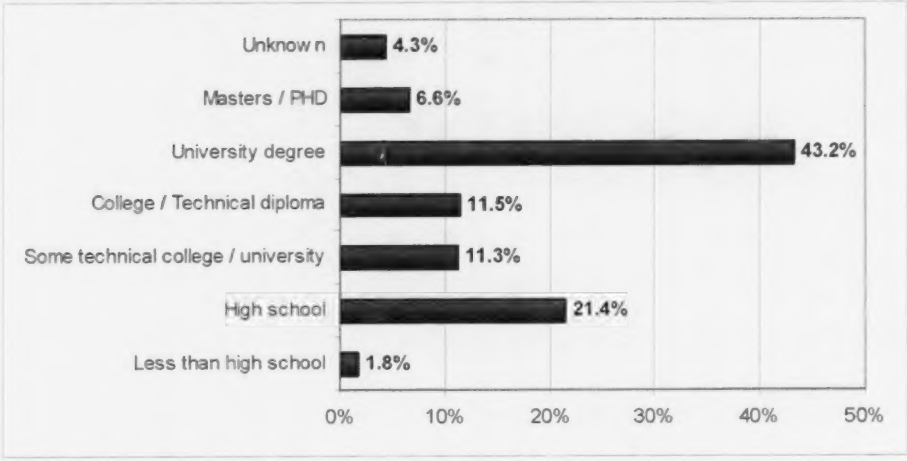
Figure 3: Gender



Education

Almost 60% of respondents reported having a college or university degree, while another 11% reported having completed at least some college or university. Twenty one percent reported high school as their highest level of education.

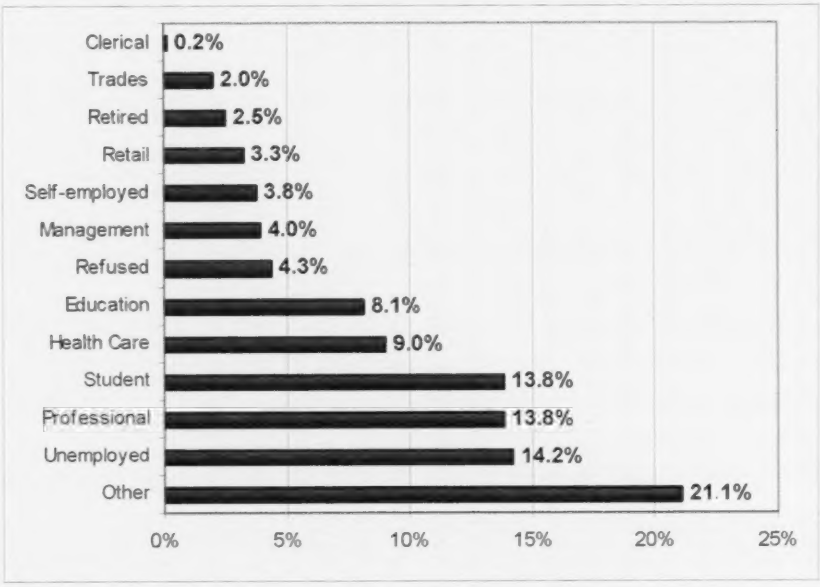
Figure 4: Education



Occupation

Three categories emerged as the primary occupations for Aurora visitors: student (13.8%); professional (13.8%); and unemployed (14.2%). However, over 20% of respondents indicated "Other" as their primary occupation, which most commonly included civil servant / office worker / company employee, housewife or service industry.

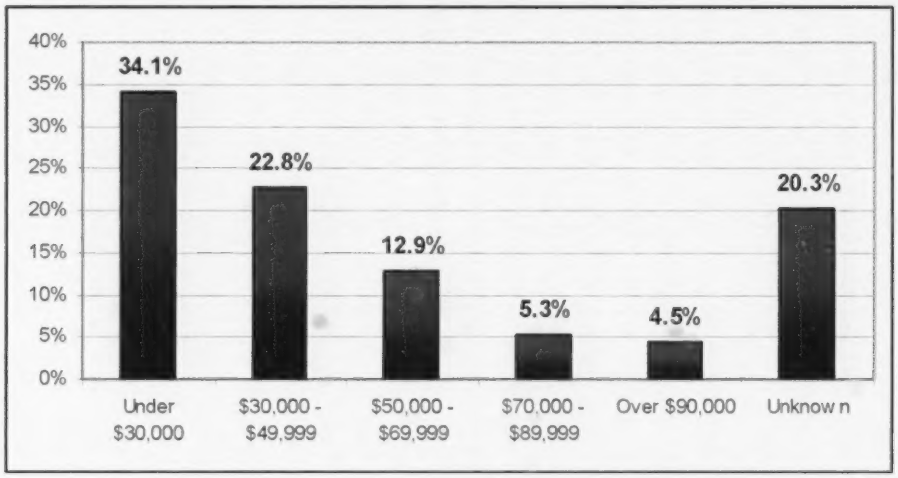
Figure 5: Occupation



Income

Of those that responded, approximately 57% reported having an annual income of less than $50,000. However, a large proportion of respondents (19%) refused to report their income, likely due to specific cultural and privacy issues.

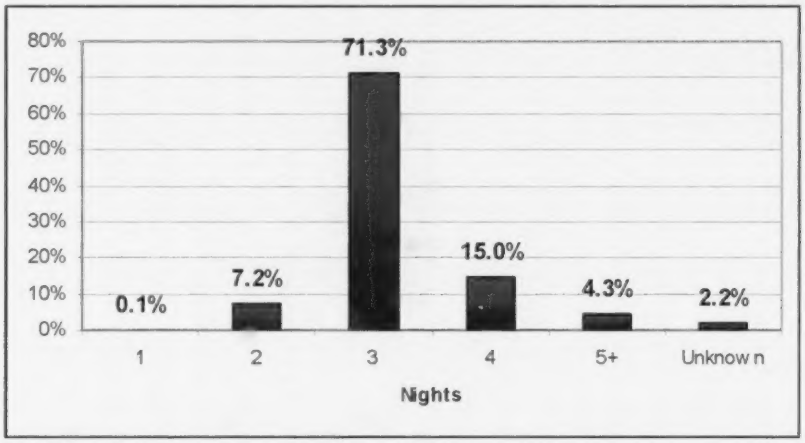
Figure 6: Income



Length of Stay

The average length of stay for Aurora visitors was 3.2 nights. The vast majority (71%) stayed for 3 nights, while less than 5% stayed for 5 nights or more.

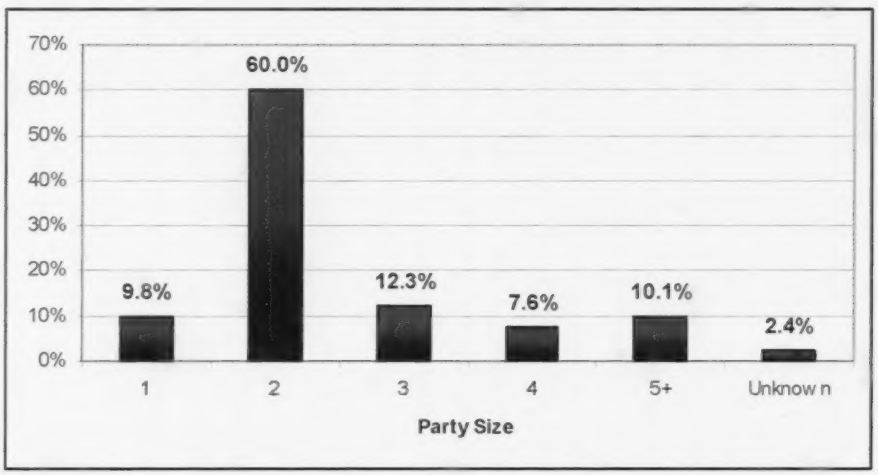
Figure 7: Length of Stay



Party Size

Approximately 72% of Aurora visitors travelled in pairs or in groups of 3. Overall, the average group size was approximately 3.3 people.

Figure 8: Party Size



Previous Vacations

Respondents were asked several questions regarding their travel for Aurora viewing vacations. Almost 5% indicated that they had previously travelled to the NWT. While the majority of those that said they previously travelled to the NWT did so only once, a small proportion (approximately 1.9%), indicated they had made multiple trips to the NWT in the past.

For those who said they had previously travelled to other Aurora viewing destinations, the majority travelled to Finland (2.9%), Alaska (1.9%), or Yukon (0.9%). Other destinations included Sweden, Greenland, Iceland or Norway. While not specifically asked, many respondents reported they had travelled to multiple Aurora viewing destinations in the past.

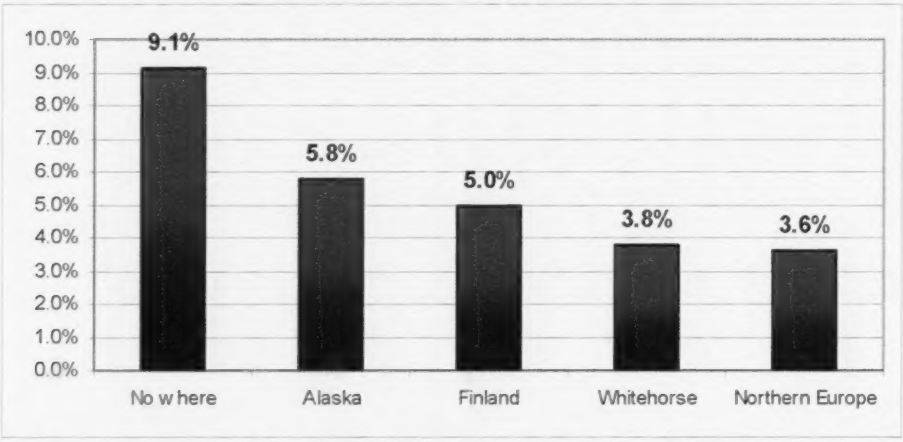
Figure 9: Previous Aurora Viewing Travel

	Percent
Previously travelled to NWT	4.7%
Previous travel to other Aurora viewing destinations (Includes travel to multiple destinations)	6.4%
Finland	2.9%
Alaska (Fairbanks)	1.9%
Yukon (Whitehorse)	0.9%
Other (Sweden / Greenland / Iceland / etc...)	2.4%

Alternate Vacation Destinations

When asked to indicate where they would have gone if they had not come to Yellowknife to view the Aurora, the most common destinations included Alaska (5.8%), Finland (5.0%), Whitehorse (3.8%), and Northern Europe (3.6%). Typically, Aurora viewing travellers limited their choice of alternative vacation destinations to specific Aurora viewing locations. However, a variety of other Canadian, US and International destinations were also listed, although in far fewer quantities.

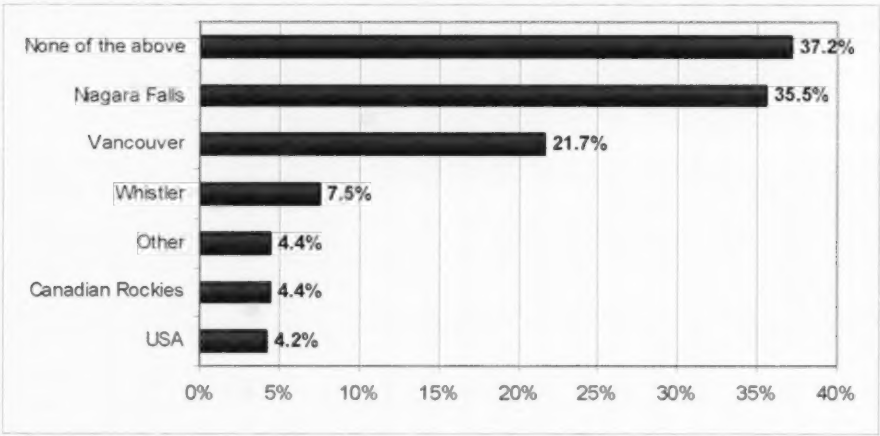
Figure 10: Alternative Aurora Viewing Destinations



Other Destinations Visited

Just over 37% of Aurora viewing travellers did not visit any other destination during their trip to the NWT. Almost 36% reported that they had also visited Niagara Falls while on their current trip. Twenty two percent indicated they travelled to Vancouver and almost 8% also travelled to Whistler, British Columbia. Fewer than 5% reported travelling to the United States or Banff / Rocky Mountains while on their current trip.

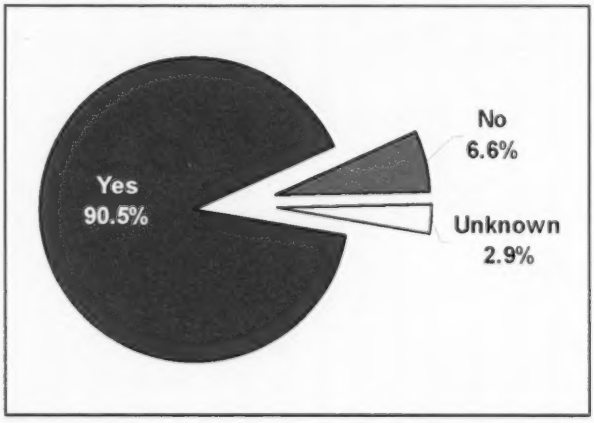
Figure 11: Other Destinations Visited on Current Trip



Aurora Viewing Success

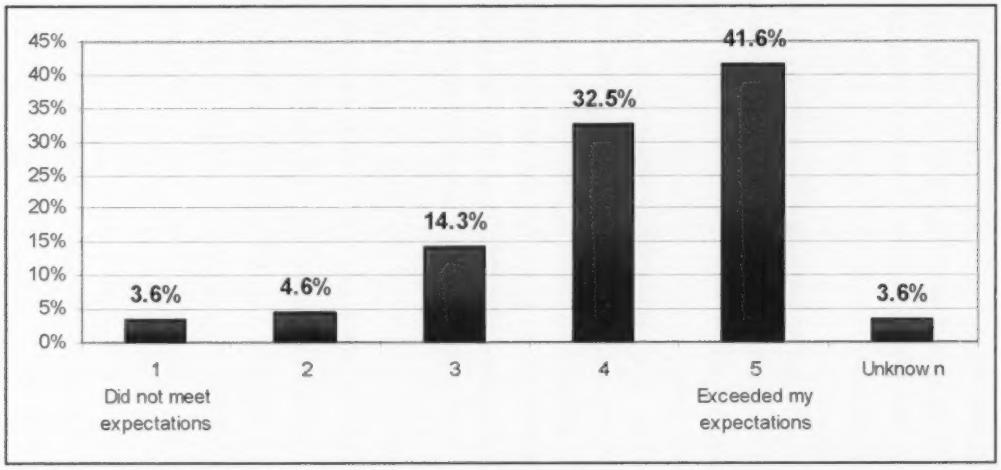
Aurora travellers were asked several questions regarding their Aurora viewing experience. Overall, 91% of respondents indicated they had seen the Aurora on their current trip, while less than 7% said they had not seen the Aurora. However, of those who stayed in the NWT for 2 nights or less, the success rate dropped to 75.5%, while the success rate for those who stayed for 3 nights or longer rose to 91.8%.

Figure 12: Did you see the Aurora on this trip?



Forty-two percent of Aurora travellers rated their Aurora viewing experience as having exceeded their expectations, while 74% rated their Aurora viewing experience either a 4 or better on a 5 point scale. Overall, travellers rated their Aurora viewing experience an average of 4.1 out of 5.

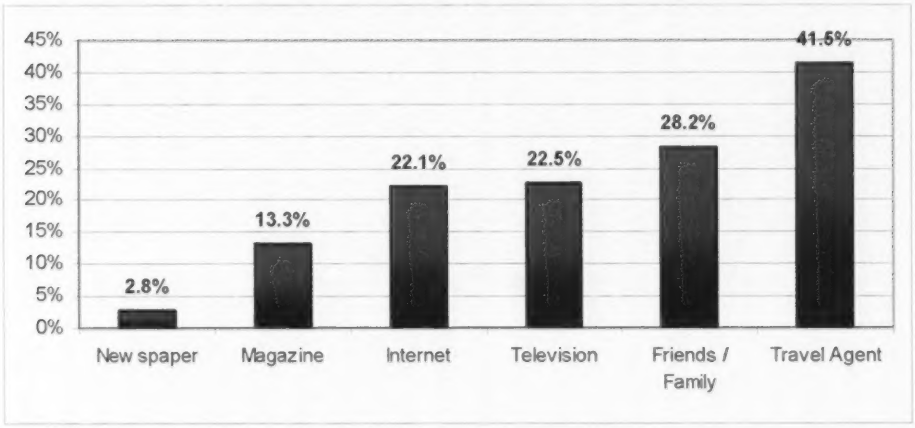
Figure 13: Rating – Aurora Viewing Experience



Source of Information

Respondents were asked to indicate from what source they had heard about the NWT. Over 40% indicated they had heard about the NWT from a travel agent and 28% indicated they heard about the NWT from friends or family. Internet (22%) and television (22%) were also common sources of information used by Aurora travellers.

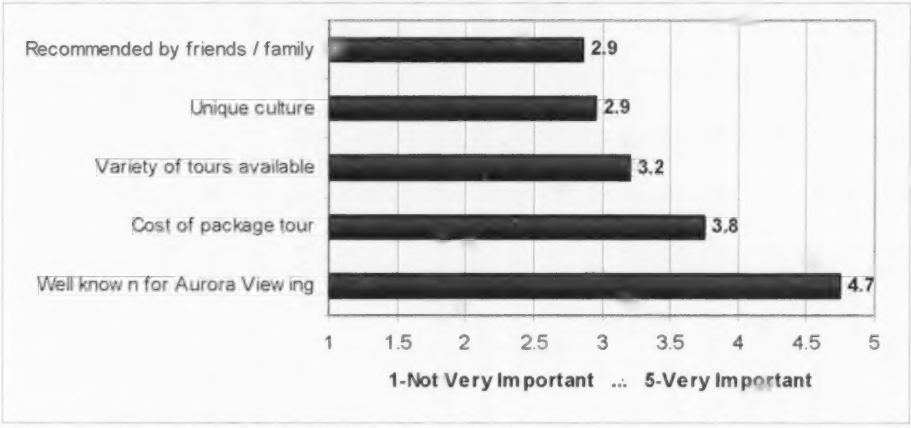
Figure 14: How did you hear about the NWT as a place to visit?



Reason for choosing to visit the Northwest Territories

Respondents were asked to rate several items on how important they were in their decision to choose Yellowknife as their Aurora viewing destination. Based on a 5 point scale, where 1 represents not very important and 5 represents very important, over 93% of respondents rated "well known for Aurora viewing" a 4 or 5 out of 5 for why they chose Yellowknife as their Aurora viewing destination. "Cost of package tour" received an average rating of 3.8 out of 5, while "variety of tours" was rated an average of 3.2 out of 5. "Unique culture" and "recommended by friends/family" received the lowest average ratings of approximately 2.9 out of 5.

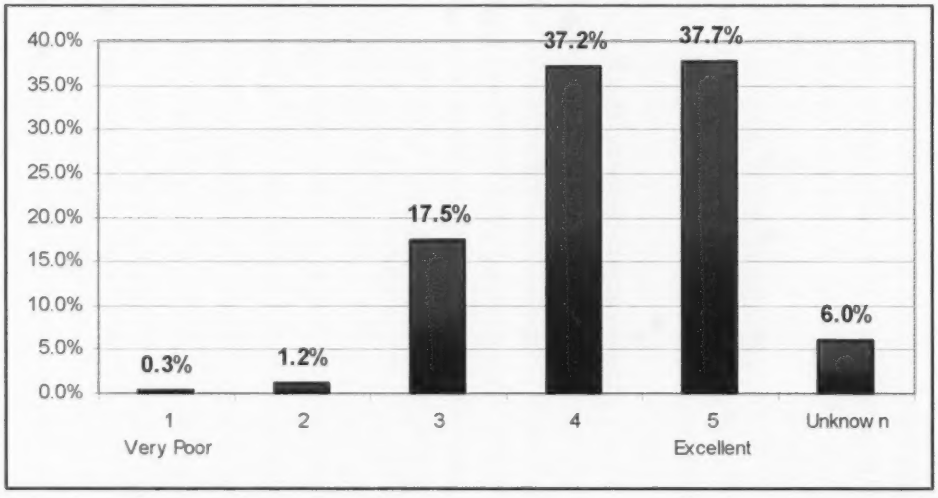
Figure 15: When choosing Yellowknife as an Aurora viewing destination, how important were the following considerations?



Yellowknife Rating

Aurora viewing travellers were asked to rate Yellowknife as a vacation destination overall. Based on a 5 point scale, where 1 represents Very Poor and 5 represents Excellent, Yellowknife achieved an average rating of 4.2 out of 5, while the most common rating was 5 out of 5.

Figure 16: Rating – Yellowknife as a Vacation Destination



Return visit

When asked whether they would consider returning to Yellowknife at another time, over 88% of Aurora travellers indicated they would, while only 9% said they would not consider returning to Yellowknife again. Of those who said they would return, 59% said they would like to return during the summer, while 52% said they would like to return again during the winter.

Figure 17: Would you visit Yellowknife again?

	Percent
Yes	88.5%
Winter	52.1%
Summer	59.1%
No	9.1%
Unknown	2.4%

Other Activities

Respondents were asked to indicate how satisfied they were with any activities they may have participated in while on their current trip, aside from Aurora viewing. Overall, the activities most commonly participated in included Town Tours (88%), Shopping (87%), Photography (84%) and Dogsledding (64%). Based on a 5 point scale where 1 represents "Not very satisfied" and 5 represents "Very Satisfied", the activities with the highest average satisfaction ratings included Snowmobiling (4.6), Dogsledding (4.5), Photography (4.0) and Snowshoeing (4.0).

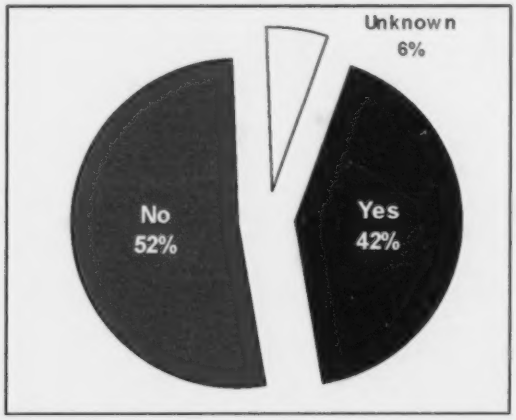
Figure 18: Activity Participation / Rating

	Participation	Average Satisfaction Rating
Town Tour	87.7%	3.8
Shopping	86.9%	3.2
Photography	83.6%	4.0
Dogsledding	63.7%	4.5
Museum Visit	56.4%	3.6
Cultural Event	45.8%	3.7
Snowmobiling	22.2%	4.6
Snowshoeing	18.0%	4.0
Flightseeing	7.4%	3.7
Skiing	2.0%	3.5
Skating	1.6%	3.1
Swimming	0.9%	3.3

Unavailable Activities

Respondents were asked to list any activities they had hoped to participate in while they were in the NWT, but did not get the opportunity while they were here. Approximately 42% of respondents indicated they had not been able to participate in certain activities, including flightseeing / wildlife viewing, snowmobile tours, dogsled tours, and ice fishing.

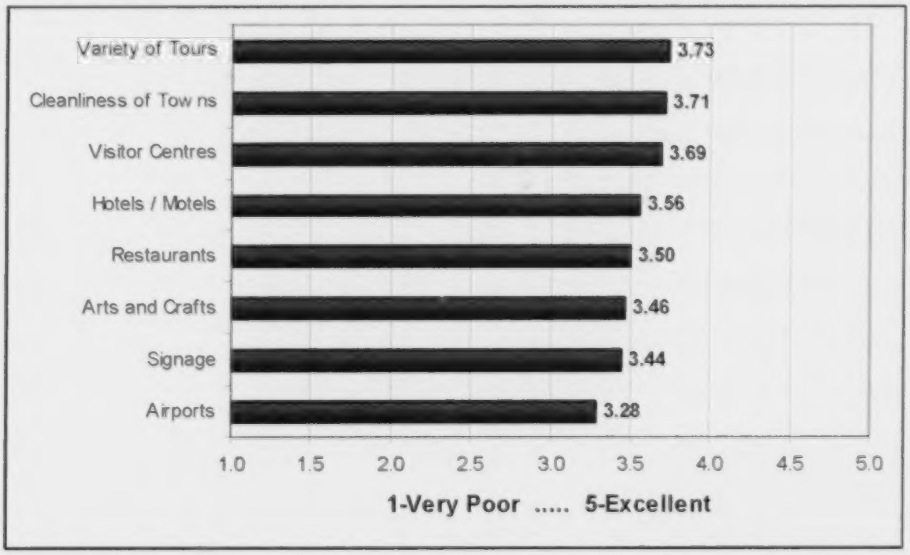
Figure 19: Were there any activities that you hoped to do that were not available?



Infrastructure Ratings

Aurora travellers were asked to rate their satisfaction with various products, services, or infrastructure they may have encountered while in the NWT. While none of the services, products or infrastructure were rated exceptionally well; overall, Variety of Tours (3.73) and Cleanliness of Towns (3.71) were rated the highest. The lowest rated services, products and infrastructure were Signage (3.44) and Airports (3.28).

Figure 20: Rating – Services, Products, Infrastructure



Trip Expenditures

Spending by Aurora travellers was organized into six general expenditure categories. Figure 21 shows the average per person expenditure for each of the categories.

Additional tours which are not typically part of the original Aurora viewing package (dogsledding, snowmobiling, etc...) were the largest expenditure category at approximately $273 per person. This was followed by souvenirs (including mugs, clothing, pins) at approximately $91 per person. However, Aurora travellers spent the least amount of any category on arts and crafts, which typically refers to local goods such as prints or carvings, at approximately $25 per person. These trends are similar to those observed in previous Aurora surveys.

Overall, Aurora travellers spent an average of $395 per person while in the NWT during the 2006/2007 Aurora Viewing season.

Figure 21: Average expenditures